



TRUCK SALES OPPORTUNITIES

Market Overview

- **Used and refurbished trucks**, primarily from Japan, dominate the Philippine market.
- Roads are narrow and in disrepair.
- Total truck registration is **growing at 4%** per annum, with more than **264,000** trucks on the road in 2004.
- A recent change in the Mining Act is expected to dramatically increase investment in mining, **spurring demand for high capacity trucks** and related equipment.

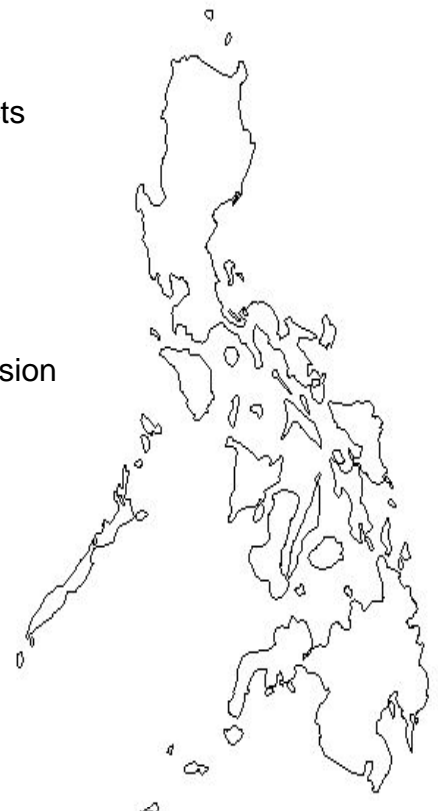


Sub Sectors and Competition

- Major truck end users include freight forwarders, consumer products manufacturers and waste management services.
- Many sub-sectors, including national and multinational consumer products manufacturers, **sub-contract** product delivery through **professional trucking companies**.
- **Preference exists for U.S. trucks** due to compliance with Clean Air Act without having to retrofit.
- Japanese trucks **compete on price**, though steering mechanism conversion from right to left is required.

Commercial Opportunities

- **Demand for trucks with capacity of 18 tons** and above will grow steadily, particularly for use in the mining industries.
- Demand for **after market products and services** continue to grow due to poor roads and aging fleets.



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